



Ceili GoPDF for CPQ

Manual

3.3.2023
Ceili Oy

Security and Terms

In this section we bring up security of Heroku and the package. We also bring up terms and privileges this package follows.

Security

All processing is handled on Salesforce provided services, either on Salesforce Org in which the package is installed or on Ceili's Heroku application. Ceili's Heroku application is hosted on <https://ceili-custom-pdf.herokuapp.com/>. Ceili's Heroku application is later referred to Heroku application. Heroku is a part of the Salesforce.

Ceili doesn't save or collect data (PDF's etc.) of package users from Heroku application. Metrics and usage details are collected to ensure Heroku application operation and security.

Terms and privileges

Ceili GoPDF for CPQ package is installed as a part of Salesforce org; thus, package user and Ceili is committed to complying with the agreements and terms of Salesforce and Heroku.

Availability of the package and Heroku application can vary. Ceili doesn't guarantee the availability of the package or Heroku application.



1 Requirements

In this section we look at requirements organization and users need in order to use the package.

Requirements

- All users using the package need to have CPQ Permission Set License.
- Salesforce org in which the package will be installed need to have "Salesforce CPQ"-package version 238.3.0.1 (or later) installed



2 Contents of package

In this section we list all the components which are included with the package.

Components

Object	Fields	Layouts	Tab	Lightning Pages	List Views	Configuration
ceili_Template__c	ceili_Quote__c ceili_Header__c ceili_Template_Theme__c ceili_Front_Page__c ceili_Footer__c	Template Layout	Templates	Template_Record_Page	Template - All	
ceili_Front_Page__c	ceili_Sender_Email__c ceili_Sender_Country__c ceili_Sender_Phone_Number__c ceili_Sender_Name__c ceili_Sender_Contact__c ceili_Sender_City__c ceili_Sender_Title__c ceili_Main_Title__c ceili_Main_Image__c ceili_Recipient_Contact__c ceili_Recipient_City__c ceili_Details__c ceili_Recipient_Title__c ceili_Recipient_Contact_Email__c ceili_Recipient_Country__c ceili_Recipient_Contact_Phone_Number__c ceili_Recipient_Name__c	Front Page Layout				
ceili_Header__c	ceili_Title__c ceili_Header_Image__c	Header Layout				
ceili_Section_Item__c	ceili_Indexed_field__c ceili_LatestSectionItemId__c ceili_Label__c ceili_Section__c ceili_Order__c ceili_Value__c	Section Item Layout			Section Item - All	
ceili_Section__c	ceili_Filter_Value__c ceili_Filter_operator__c ceili_Has_numbering__c ceili_Filter_field__c ceili_Header_style__c ceili_Main_section_of_product_hierarchy__c ceili_Level__c ceili_Object__c ceili_LatestSectionId__c ceili_Page_Break__c ceili_Order__c ceili_Template__c ceili_Parent_Section__c ceili_Type__c ceili_Title__c	Section Layout		Section_Record_Page	Section - All	
ceili_Template_Theme__c	ceili_Font__c ceili_ListColorCode__c ceili_BorderColors__c ceili_BorderColorCode__c ceili_Line_Colors__c	Template Theme Layout				
ceili_Footer__c	ceili_Details__c ceili_Name__c	Footer Layout				
Ceili GoPDF for CPQ Configuration (Custom Metadata Types)	ceili_TargetObject__c ceili_Print_to_PDF_field_api_name__c	Ceili GoPDF for CPQ Configuration Layout				SBQQ__QuoteLine__c

SBQQ_Quote_c (Not included with the package)				Quote_Record_Page Quote_Record_Page2 Quote_Record_Page1		
SBQQ_QuoteLine_c (Only the single field is included with the package)	ceili__Print_to_pdf__c					
Product2 (Not Included with the package)					Product2 - All	

- Apex Classes:
 - CloneTemplateController
 - CreatePDFHttpCallout
 - CreatePDFController_Test
 - CreatePDFController
 - CloneTemplateController_Test
 - CustomPDFException
 - CreatePDFWrapper
 - CreatePDFUtils
 - CreatePDFHttpCallout_Test
 - FetchProductHierarchy
 - DeleteTemplateController_Test
 - DeleteTemplateController
 - CustomPDFTestDataFactory
 - TemplateBuilderHandlerClass
 - ProductHierarchyWrapper
 - FetchTemplateHierarchy
 - FetchSectionHierarchy
 - TemplateWrapper
 - TemplateBuilderWrapper
 - TemplateBuilderHandlerClass_Test
 -
- Actions:
 - Clone_Template (ceili__Template__c)
 - Delete_Template (ceili__Template__c)
- Lightning Message Channel
 - CustomPDFCommunication – NOT IS USE (Unable to delete message channel from published package)
 - SelectedRecord – NOT IS USE (Unable to delete message channel from published package)
- Lightning Web Component Bundles:
 - ceiliGoPDF
 - ceiliGoPDF_TemplateBuilder
 - ceiliGoPDF_TemplatePreview
 - cloneTemplate
 - cpqQuoteTemplateFeature
 - deleteTemplate
 - sectionItem
 - sectionPart
- Permission sets:
 - Ceili_GoPDF_User – Read permissions to allow usage of the package.
 - Ceili_GoPDF_Admin – Read/Write/Create/Delete permissions to every object in package.
- Remote Sites:
 - Ceili_Custom_PDF



3 Installation and configuration

In this section all steps to install and configure the package are brought up.

Installation

1. Download package from AppExchange: <http://<url>.com>
2. Choose for which users you want to install the package.
3. Allow endpoint: <https://ceili-custom-pdf.herokuapp.com/>

Configuration

1. There are two (2) Permission Sets: Ceili GoPDF - Admin & Ceili GoPDF – User.
Assign Users to Permission Sets.
 - a. Navigate Setup → Permission Sets
 - b. Open Permission set
 - c. Press “Manage Assignments”
 - d. Press “Add Assignment”
 - e. Select User you want to Assign to the Permission Set -> Press “Next” -> Press “Assign”
2. There is Custom Metadata Type which controls on which field Enables Quote Line to be processed on PDF generation. You can use default field `ceili__Print_to_pdf__c` (jump to section 3) or create your own field to use (NOTE! Field needs to be type Checkbox). Here is an example how to create twin field with default value and configure it to the Custom Metadata Type
 - a. Navigate Setup -> Object Manager -> Product -> Fields & Relationships
 - i. Create New field with following values:
Type: Checkbox
Label: Print to PDF
Default Value: Unchecked
Field Name: `Print_to_PDF`
Description: Field to control weather Quote Line is processed in the PDF creation process
 - b. Navigate Setup -> Object Manager -> (CPQ) Quote Line -> Fields & Relationships
 - i. Create New field with following values:
Type: Checkbox
Label: Print to PDF
Default Value: Unchecked
Field Name: `Print_to_PDF`



Description: Field to control whether Quote Line is processed in the PDF creation process

- c. Navigate Setup -> Custom Metadata Types -> Ceili GoPDF Configuration -> Manage Ceili GoPDF Configurations
 - i. Create New Ceili GoPDF Configuration with following values:
Label: Print to PDF field
Ceili GoPDF Configuration Name: Print_to_PDF_field
TargetObject: SBQQ__QuoteLine__c
Print to PDF – field api name: Print_to_PDF__c
 - d. Now you are good to go. All Quote Lines you want to always use in the PDF creation process you can set True value on related Product
3. Next up you need to add ceiliGoPDF component to the (CPQ) Quote Page. Create lightning record page for (CPQ) Quote if it does not exist yet.
- a. Navigate Setup -> Object Manager -> Quote -> Lightning Record Pages -> Choose Page you want to use and press “Edit”
 - i. On the left side choose Components and scroll down until you see section called “Custom - Managed”. From there you can see a component named “ceiliGoPDF”. Drag and drop component to the page. Press “Save” on top right corner.



4 Templates

In this section we go through how to clone, edit and delete Ceili GoPDF - Templates, Ceili GoPDF - Sections and Ceili GoPDF - Section Items. We also present ways to create Templates from start to “ready to use” templates. This section also includes the creation process of Ceili GoPDF - Header, Ceili GoPDF - Footer, Ceili GoPDF - Template Theme and Ceili GoPDF - Front Page.

What does Template consist of?

Templates consist of:

- **Header** which is section on PDF that is displayed at the top of the PDF
- **Footer** which is section on PDF that is displayed at the bottom of the PDF
- **Front Page** is the first page of the PDF
- **Template Theme** will control border and list colors on PDF, and also Font used with all the texts
- **Sections** are the form of the PDF. They contain
 - logic to choose which Quote Line contains information needed (**Filter field, Filter operator, Filter value**)
 - They can use different **Types** such as *Table, List, Text Area, List with header, Header, Table without header and List with bullets*
 - When Sections type is Header you can choose level of the header from **Header style** field
 - **Order** tells placement of the Section related to the other Sections on the same level
 - **Has numbering** is often used with the header type Sections. When selected True Section will include numbering at front of the text
 - **Object** is field which will tell from which object the Section Item information and Section information will be taken
- **Section Items** store values to use on Tabela, Lists, Text Areas and so on. Following fields are included on Section Item:
 - **Label** and **Value** is used differently in different Section types:
 - Table - Label represents header row, Value - represents value to display from each Quote Line
 - List - Label is text that is shown in left side, Value is text that is shown in right side
 - Text area - Only uses Value
 - Table without header - Only uses Value
 - List with header - Label is text that comes on top of the Value
 - List with bullets - Only uses Label



- Like with Section, Section Item has **Order** field to select in which order to show different Section Items
- **Conditional Value** will be shown if the Value field is empty or doesn't have any output when information is trying to be found from object
- **Indexed field** is used with Table to control whether incrementing number is wanted to be shown at Table
- **Bold Label** will bold text in Label field on the PDF

Field syntax

On Section you choose on which object contains Section and Section Item fields with field API name calls. You can call fields on that object by putting following syntax **`{!<fieldApiName>}`** into any text field on section or section item.

Filtering

On Section, it is possible to filter information by comparing the "Filter field" field with the selected operator to the "Filter Value" field.

A "Filter field" is a text field that takes the API name of the object field (See **Field syntax** from above).

"Filter operator" is a picklist field from which you can select the desired operator for comparison.

"Filter value" is a text field used to compare with the value of the "Filter field" field.

How to create Header, Footer, Template Theme and Front Page?

Header

The Header component has "Title" field where you can enter the desired text and the ability to add image displayed in header (See **Include images to the pdf** from below). The field can also be filled with one of the API names of the Quote object field (See **Field syntax** from above).

Footer

The Footer component has two text fields which can be filled with basic text or with the API names of Quote object field (See **Field syntax** from above).



Template Theme

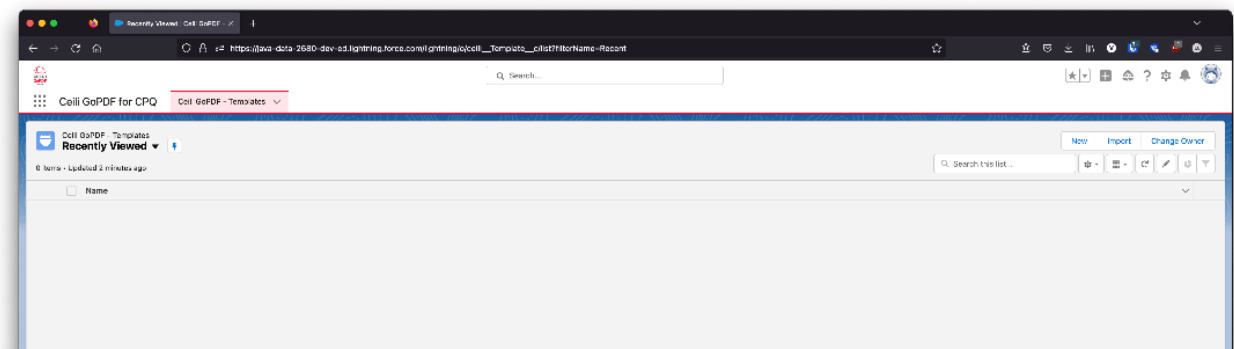
Template Theme component defines the font to be used and the colors of the border and list lines from the picklists. Alternatively, you can assign line and border colors by adding color code to the text fields (for example #727C91).

Front Page

Front page component contains text fields which all work dynamically with API names of Quote object fields (See **Field syntax** from above). The front page also has the ability to include image.

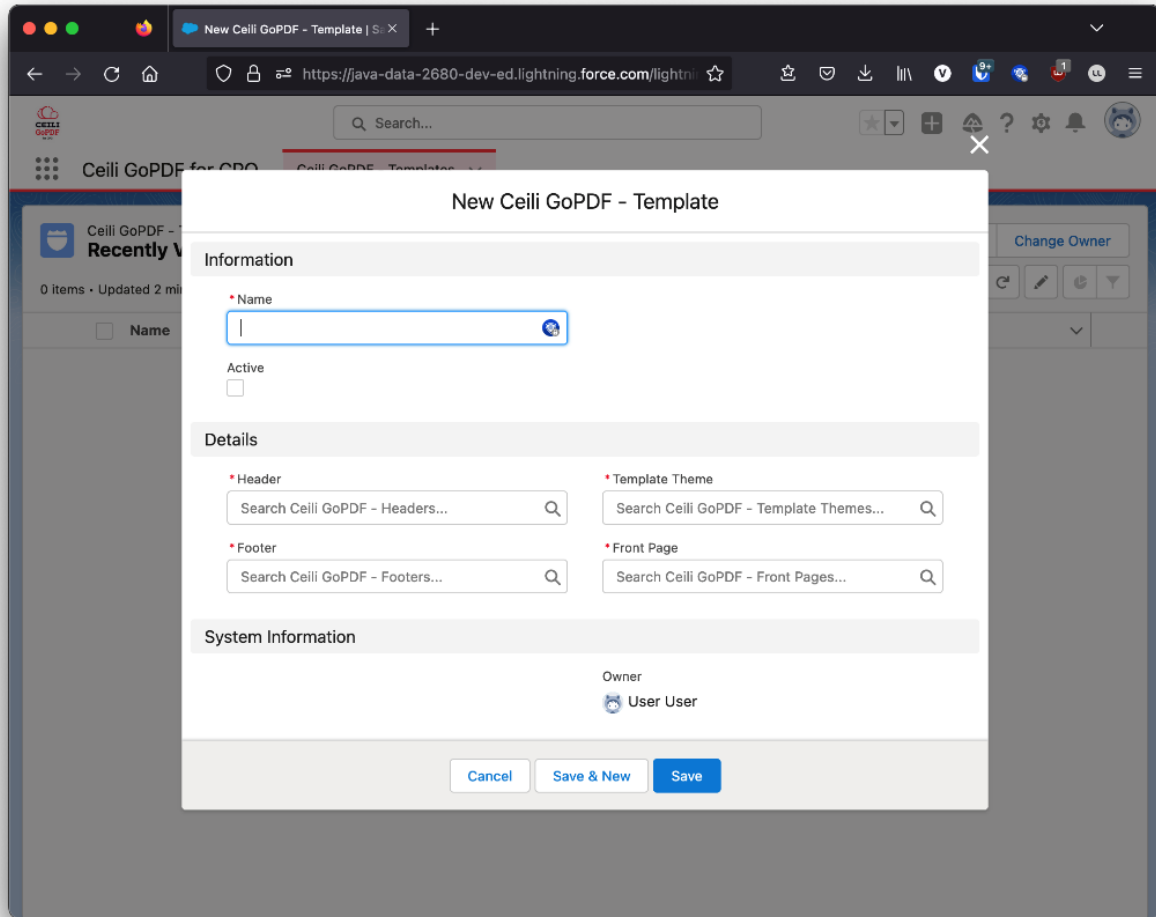
How to build a Template – step by step

1. Go to “Ceili – GoPDF for CPQ” application.



2. Start creating a new template by pressing “New”.





New Ceili GoPDF - Template

Information

*Name

Active

Details

*Header

Search Ceili GoPDF - Headers...

*Template Theme

Search Ceili GoPDF - Template Themes...

*Footer

Search Ceili GoPDF - Footers...

*Front Page

Search Ceili GoPDF - Front Pages...

System Information

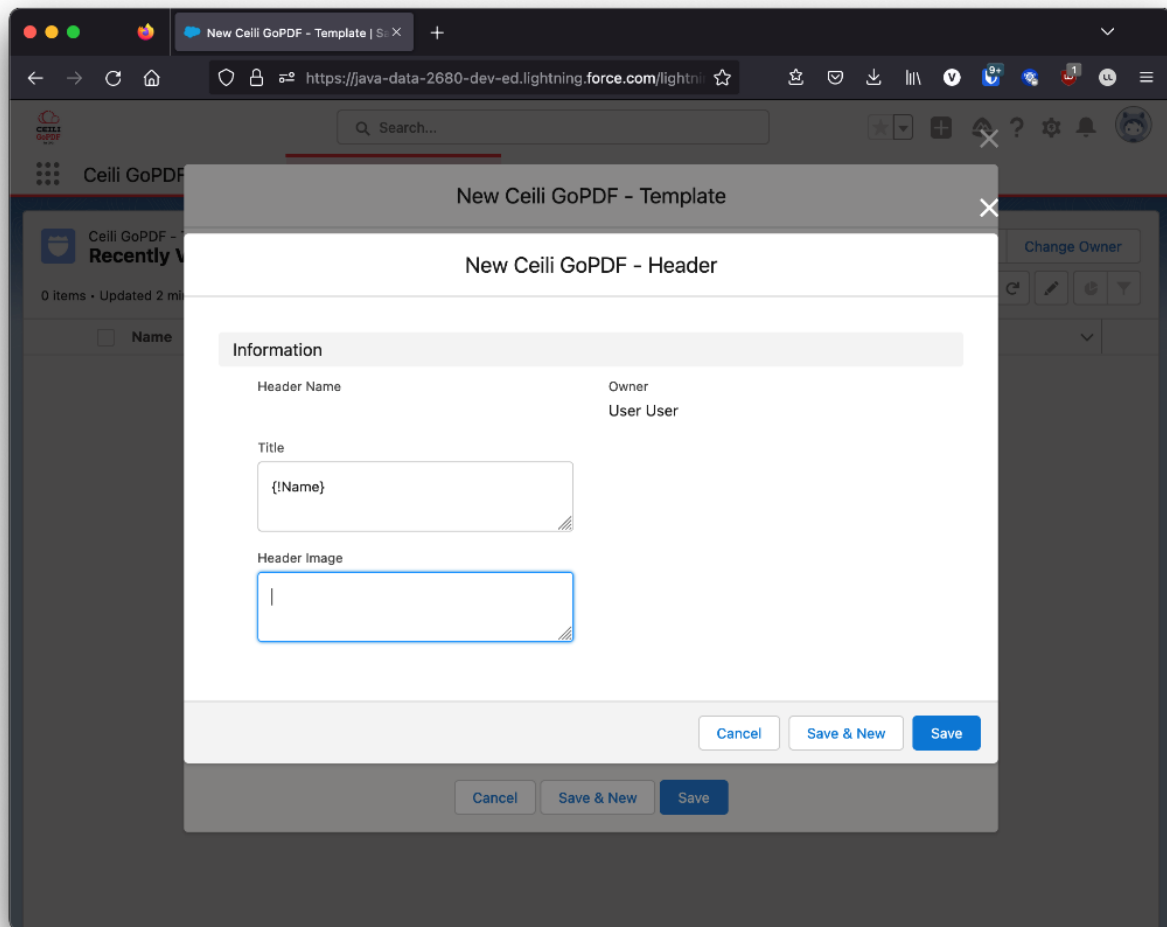
Owner

User User

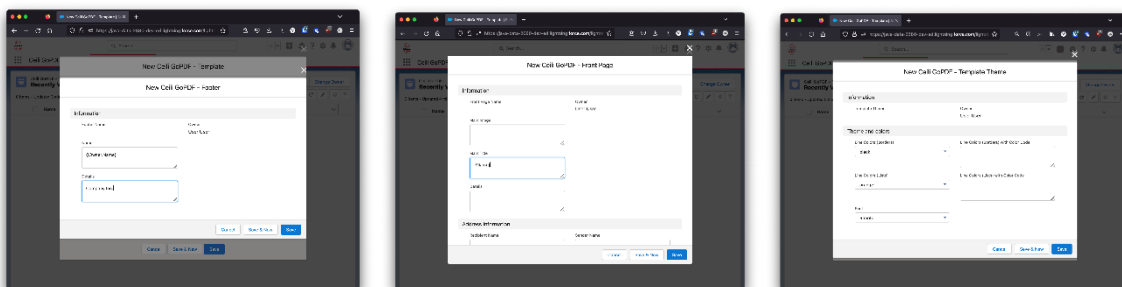
Cancel Save & New Save

3. Name the new template and check "Active" to true.
4. If you haven't already created "header", create one.



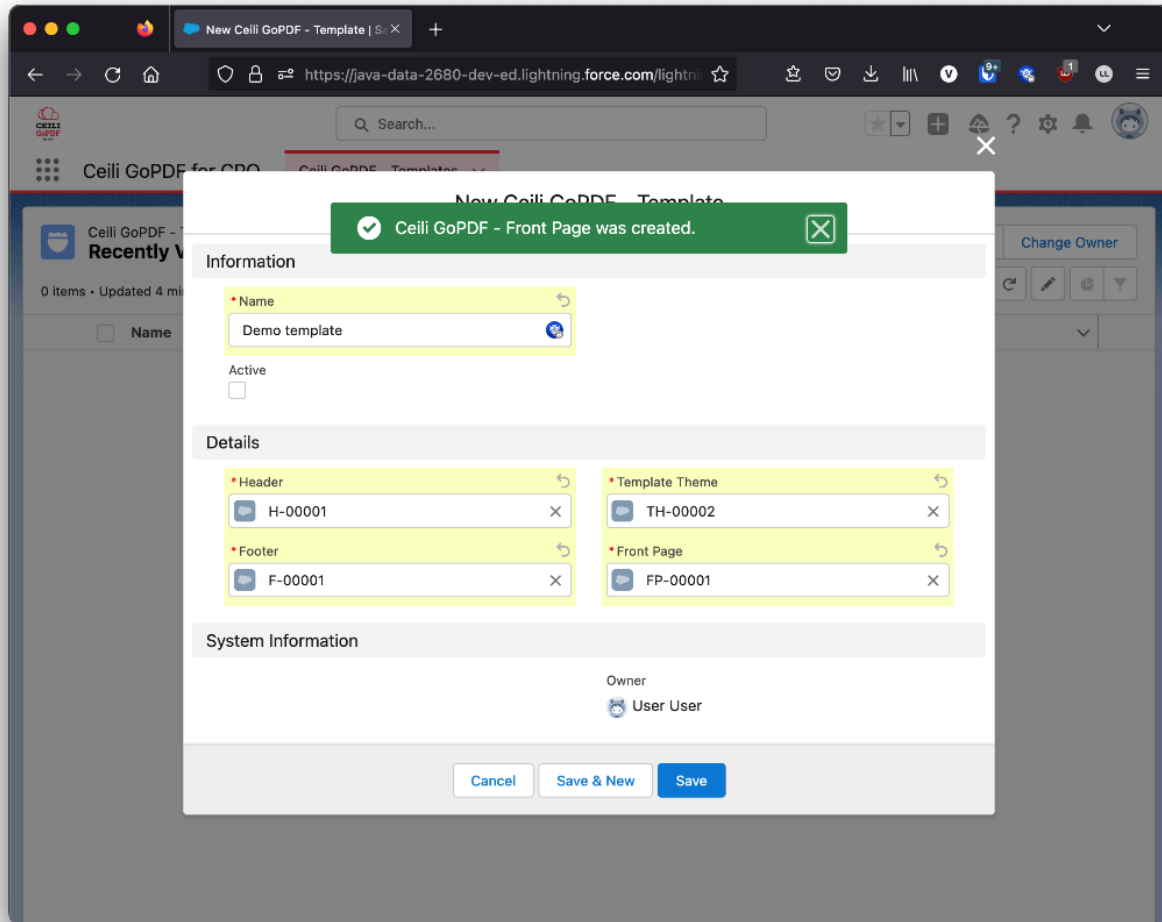


5. Repeat step 4. for footer, template theme and front page.



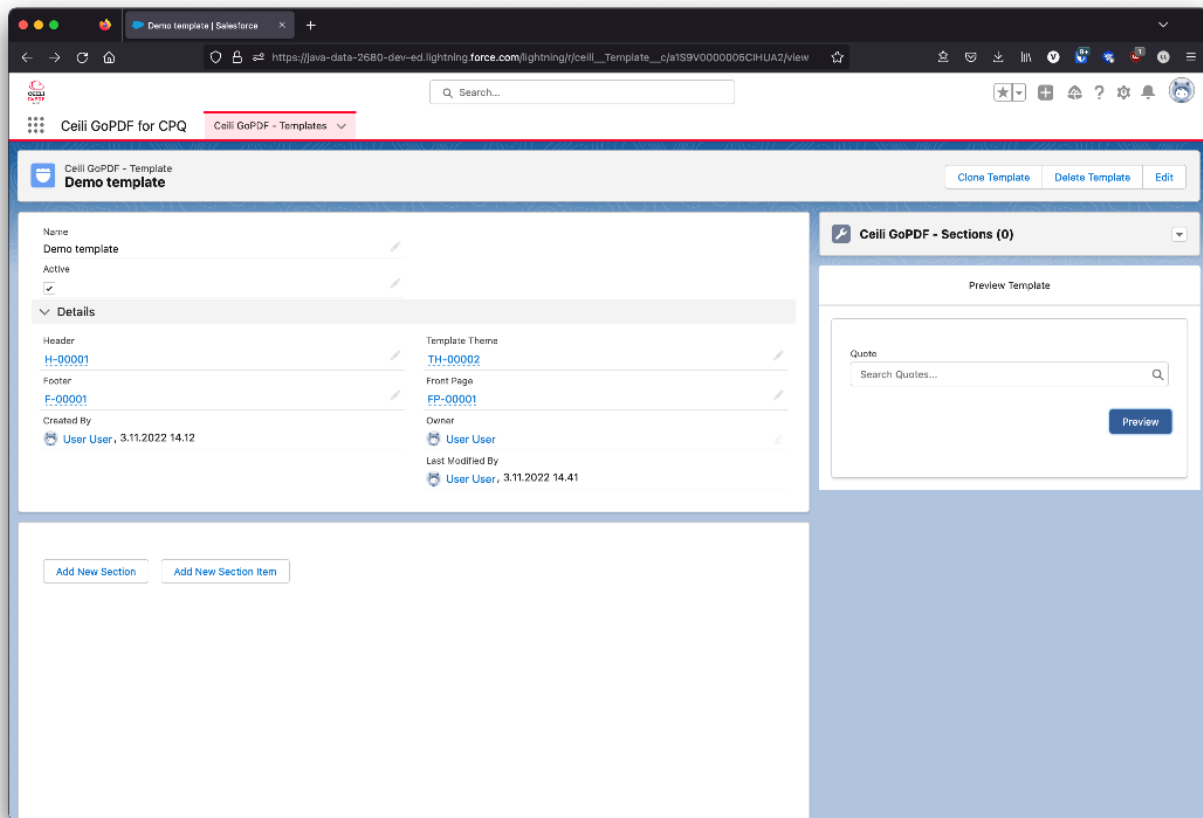
6. When you have defined all the details, save the template.





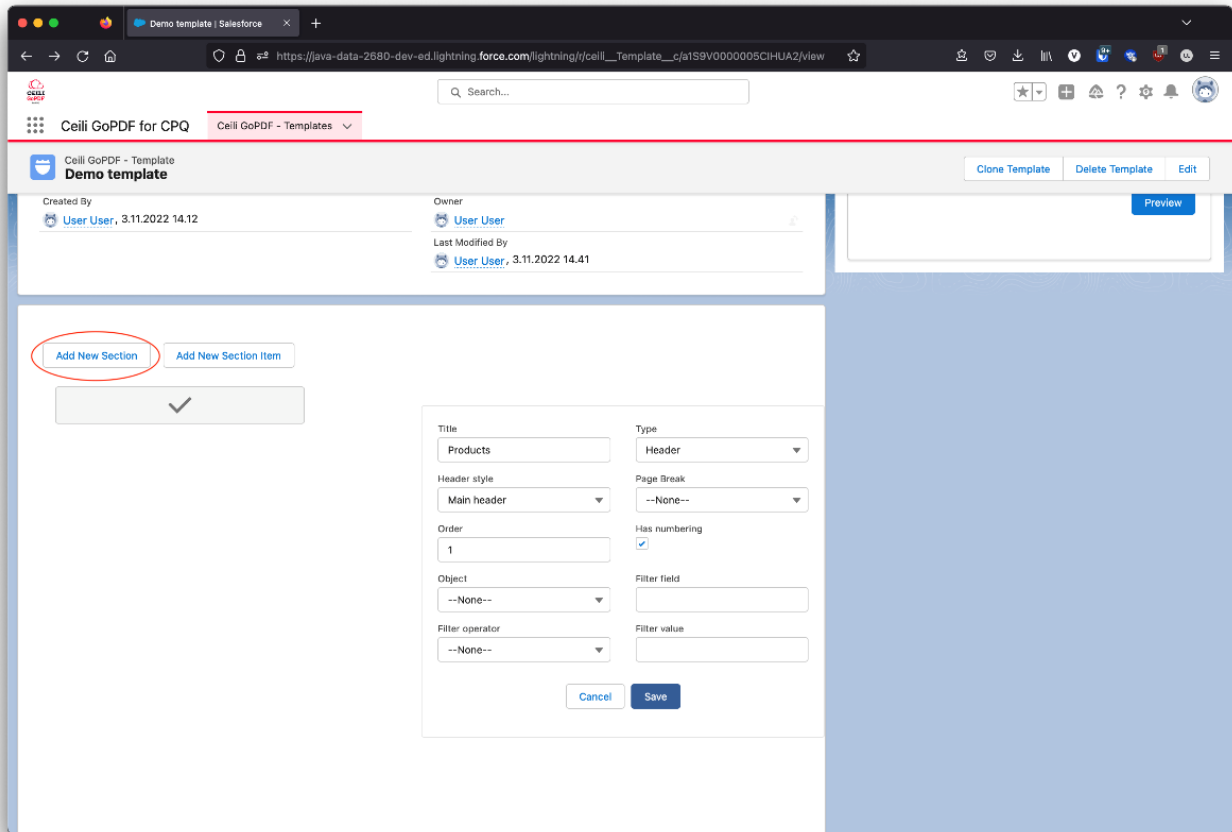
7. Now the template is created you can start creating the sections and section items.



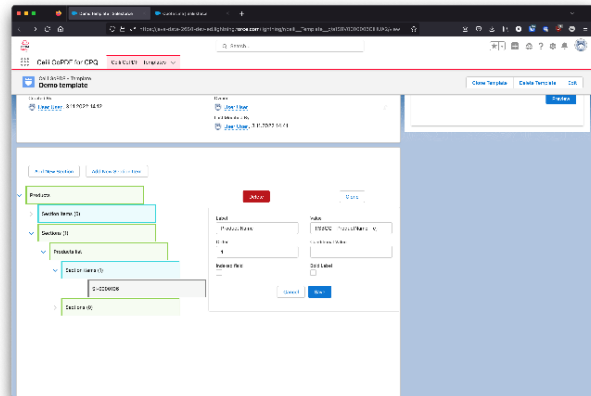
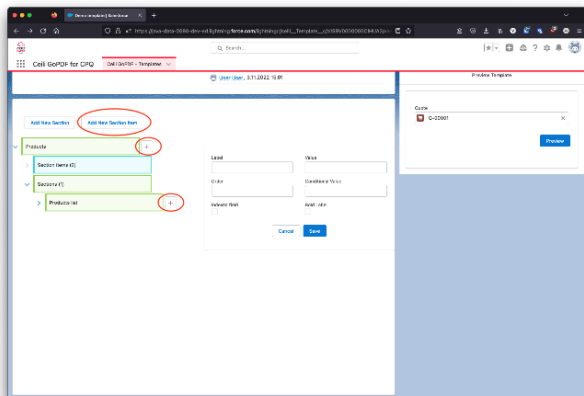


8. Create a new section by clicking on "Add New Section". By default, sections are created at the highest level, but by pressing on plus –sign next to a section you can link the new section to be its child.



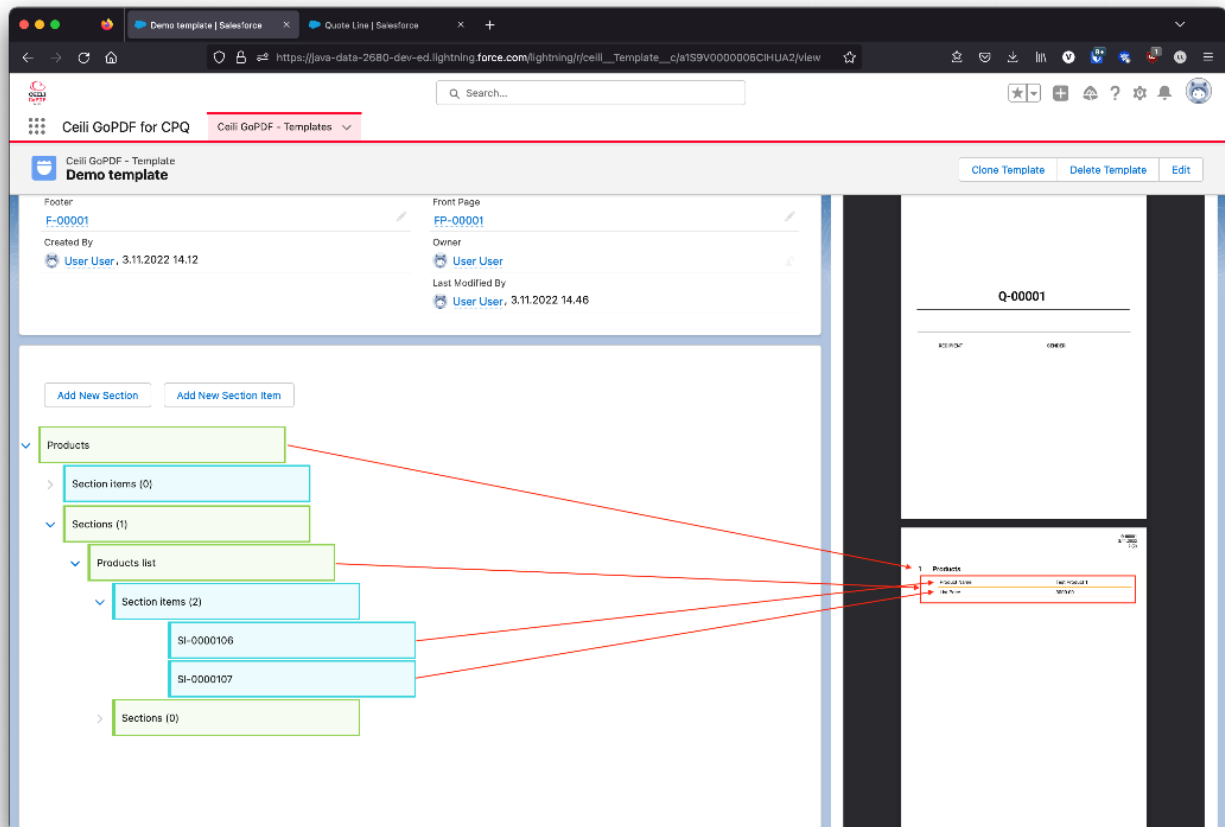


9. Create a new section item by clicking on “Add New Section Item”. Choose on which section you want to link the section item by pressing on plus –sign.



10. Template can be previewed with “Template preview” component. Use an existing (CPQ) quote to preview the template.





How to build a Template?

Template creation starts with adding a new Section in which you can include more Sections or Section Items depending on the Section Type you are using. Section Types are listed above under “What does Template consist of?”.

Sections consist of different fields which are used differently based on the Section Type you are using (Section Types are listed above on “What does Template consist of?”).

Main Sections are usually Headers or Text Areas. In the Header type of section, you can use the API names of the fields of the selected object as a Title. It is possible also to use the combination of API name and basic text as a Header Title. You can choose one of three styles for the title from the Header Style picklist field.

You can also maintain a numbered order on Header Sections, by assigning a number on the Order field and checking “Has numbering” checkbox. By checking “Has numbering” checkbox template will generate the right number based on the Header Style.



Example:

	Header Style
1	Main Header
1.1	Subheader
1.1.1	Subsubheader

On the other Section types, the Title field is just the name of the Section and does not appear anywhere on the Template.

Sections has also the possibility to filter out records. Filtering works the same way as told above (See **Filtering**). Filtering is a useful feature when creating, for example, a List or Table type of Sections.

Here is a guide on how to use other Section Types.

Table

On Table Section type, one Section Item represents one table column. Label field is the column header. In the Value field, you can specify the API name of the field that value is retrieved from the selected object type in the Section. Order field represents column order on the Table. Conditional Value is used if the Value field or retrieved field is empty. The Indexed field checkbox can be used for row numbering. When checked template will generate the current running number to the column.

List

On List Section type, one Section Item represents one list row. List order can be manipulated with the Order field of the Section Item. On the document, list rows are separated by a line.

Section item of the List Section also contains Label and Value fields which are text area types of fields. Label and Value fields can be populated with basic text or with the API name of the desired field from the selected Section object. Conditional Value will



be shown if the Value field is empty or doesn't have any output when information is trying to be found from the object.

Text Area

Text Area is just a text shown on the document. Text Area component uses only Value field when showing text on the document. Value field can be populated with basic text or API names. Basic text and API name combinations are also possible on this component.

List with header

On List with header component one Section Item represents one list item. Label field is an item that value can be bolded and will always be before the Value field value.

Example:

Downpayment	<-- Label field value (Bold Label checkbox = true)
25% With Order	<-- Value field value

Label and Value fields can be left empty, and the order can be manipulated with the Order field. Both fields can be filled with the API name of the field of the selected object.

Table without header

Table without header- component is a maximum two-column table. One Section Item represents one column and column order can be manipulated with the Order field.

List with bullets

On List with bullets – component one Section Item represents one list item. List value is defined to Label field. Value field is not used with this component. Label field can be populated also with API name.

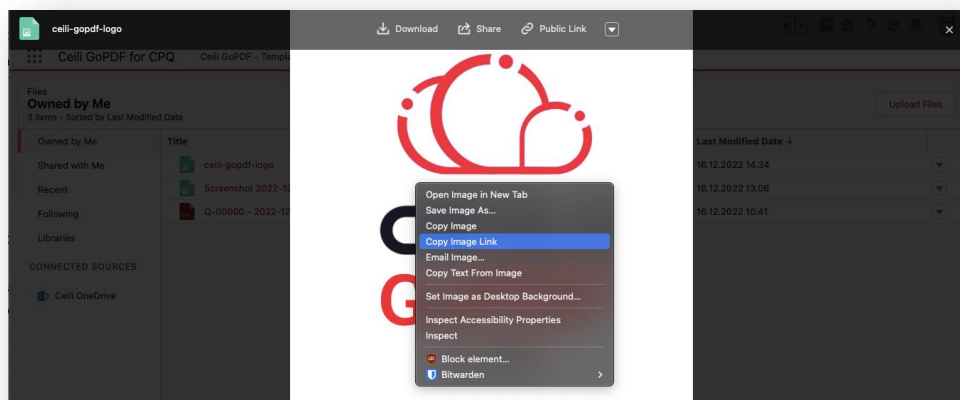


Example:

- Value 1
- Value 2
- Value 3

Include images to the pdf

Images can be included in the header or front page. The “Header Image” or “Main image” fields must be a link to an image that must be in your organization's Salesforce instance (Files). Open the ContentDocument containing the image, right click and choose “Copy Image Link”. Paste the copied link to the image field.



How to clone Template, Section or Section Item?

Template

Template can be cloned from the “Clone Template” button. Clone operation will clone all information on Template and related Sections and Section Items.

Section

Select Section you want to clone. When the Section edit view opens you can see “Clone” button on right side. Press that and select Section you want to clone it underneath or you can clone Section on main level by selection space underneath



main Sections list. Note that cloning Section will also clone all Sections and Section Items that are under the cloned Section.

Section Item

Select Section Item you want to clone. When the Section Item edit view opens you can see "Clone" button on right side. Press that and then select Section which you want to add selected Section Item.

How to delete Template, Section or Section Item?

Template

Template can be deleted from the "Delete Template" button. Delete operation will delete all Sections and Section Items also.

Section

Select Section you want to delete. When the Section edit view opens you can see red "Delete" button on left side. Press that and in next screen press ok. Note that deleting Section will also delete all Sections and Section Items that are under the deleted Section.

Section Item

Select Section Item you want to delete. When the Section Item edit view opens you can see red "Delete" button on left side. Press that and in next screen press ok.



5 Usage

In this section we go through how to create PDF. In this section we assume that all the previous steps are done correctly.

How to create PDF

1. Navigate to the Quote you have configured
2. Choose Quote Template you have created (follow [Section 4: How to build Template?](#))
3. Check whether all the needed Quote Lines have Print to PDF -value as True. If not press Quote Line you want to include. (Tip! Quote Lines that have green background are selected for the processing)
4. With "Preview" button you will see how the PDF looks like. With "Save" button you can create new PDF. All PDFs are stored on the Quote objects "Notes & Attachments" section. They are name with following naming convention:
<QuoteNumber> - <PDFCreationDate> - V<VersionOfTheDocument>

